



FACULTY AND CBME

Triggering Forms in one45 and on a mobile device

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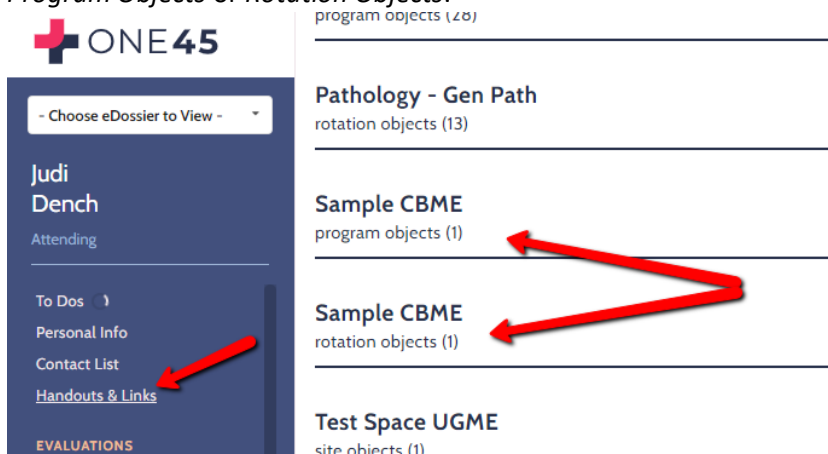
Faculty and CBME: Overview

Please find instructions below on how you as a faculty member can review the EPAs your department is responsible for, how to trigger forms to evaluate residents on their performance on a particular EPA, how to complete those forms, and how to review forms you have completed in the past. There are instructions for accessing one45 from a browser on your computer or a browser on a mobile device.

Knowing the EPAs and their requirements (Desktop and Mobile)

Note there is no way for you to preview blank EPA forms in one45 prior to triggering them on residents. Some program administrators have uploaded a pdf of each stage's EPAs, either as program object or a rotation objects. If this is the case in your program, you can find them in your *Handouts and Links* section. Follow the directions below to access that tool.

1. Open a browser on your mobile device or desktop (Chrome, Firefox, Microsoft Edge, or Safari) and navigate to <https://one45.med.dal.ca> and proceed to step 2. If you do not remember your username and password for one45, you can request a password reset from the log in page using these instructions:
 - a. Navigate to <https://one45.med.dal.ca>
 - b. Click *Need help logging in?*
 - c. Enter the email address associated with your one45 account (the email address you receive one45 alerts in).
 - d. Click *Send email reminder*.
2. Click on *Handouts and Links* in the main menu (mobile users, click the *Menu* button first). Click on either *Program Objects* or *Rotation Objects*.



3. If available to you, the EPAs may be in one or more documents found in those sections .



Triggering EPA forms

Please find instructions below on how you as a faculty member can trigger forms to evaluate residents on their performance on a particular EPA. These instructions include both desktop and mobile browser steps.

Triggering EPA forms for residents you wish to assess (Desktop version)

1. Log into one45 at <https://one45.med.dal.ca> and proceed to step 2. If you do not remember your username and password for one45, you can request a password reset from the log in page using these instructions:
 - a. Navigate to <https://one45.med.dal.ca>
 - b. Click *Need help logging in?*
 - c. Enter the email address associated with your one45 account (the email address you receive one45 alerts in).
 - d. Click *Send email reminder*.
2. Once logged in, you will be taken to your Todos. You will see a list of forms under *Forms to Send*.

ONE45

YOUR TO DOS: 88 expand all collapse all

Forms to send

Choose a new form to send

Form
CBD - GP - Narrative Feedback
Direct Observation Form - Emergency Psych Assessment
Direct Observation Form - Medication Review
Direct Observation Form - Pediatric Psych Assessment
ENT01_TTD01: Providing initial clinical assessment, investigation and development of a management plan with acute upper airway obstruction

- a. FYI, if your *Forms to Send* is too long, and you are just trying to get to your *Forms to Complete*, you can collapse it with this arrow.

ONE45

YOUR TO DOS: 87 expand all collapse all

Forms to send

Forms to complete (12)

Please fill in the forms you see here

Target	Activity	Program	Dates	Form	Contact
MacDonald, Barry the Resident	O3 - Core of Discipline	Workshop - CBME	Mar 20/20	MED/ONC 3COD-EPA01: Assessment	out out

3. If you have the option, pick which rotation you observed or participated in the EPA you are now assessing the resident on. However, many departments run their EPA forms off of rotations based on CBME stage. If this is the case, a default will be automatically selected, as seen below. Click *Continue to step 2*.

Form to send

SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures

Step 1 - Select an event

Surgical Foundations - Transition to Discipline (Surgical Foundations)

Surgical Foundations - Transition to Discipline (Surgical Foundations)

Continue to step 2

Step 2 - Select a date

- Specify the date the EPA was assessed. Click *Continue to step 3*.

Form to send
SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures

Step 1 - Select an event
Surgical Foundations - Transition to Discipline (Surgical Foundations)

Step 2 - Select a date
Jun 04, 2019

Jun 04, 2019

Calendar view showing dates from June 26 to July 6, 2019. The date Jun 04, 2019 is selected.

Buttons: Back to step 1, Continue to step 3

- Search for the resident you are looking for, check their name, and click *Send form*.

Step 3 - Choose who you will be assessing
Parton, Dolly the Resident (resident) show selections

Buttons: Pick from suggestions, or, Last name, Search

From search:

Select: all, none

Parton, Dolly the Resident (resident)

Buttons: Back to step 2, Send form

- If you only picked one resident, it should open automatically. Otherwise, you can access it in your *Forms to Complete* section of your Todos, ready to complete. Click on it, fill out all the mandatory questions, and submit it as you would other forms. If you need help with this process, see the *Completing EPA Forms* section of this manual below.

ONE45

Choose eDossier to View

Judi Dench
Attending

To Dos 03

Personal Info

Contact List

Handouts & Links

EVALUATIONS

Evaluations

Evaluations As Learner

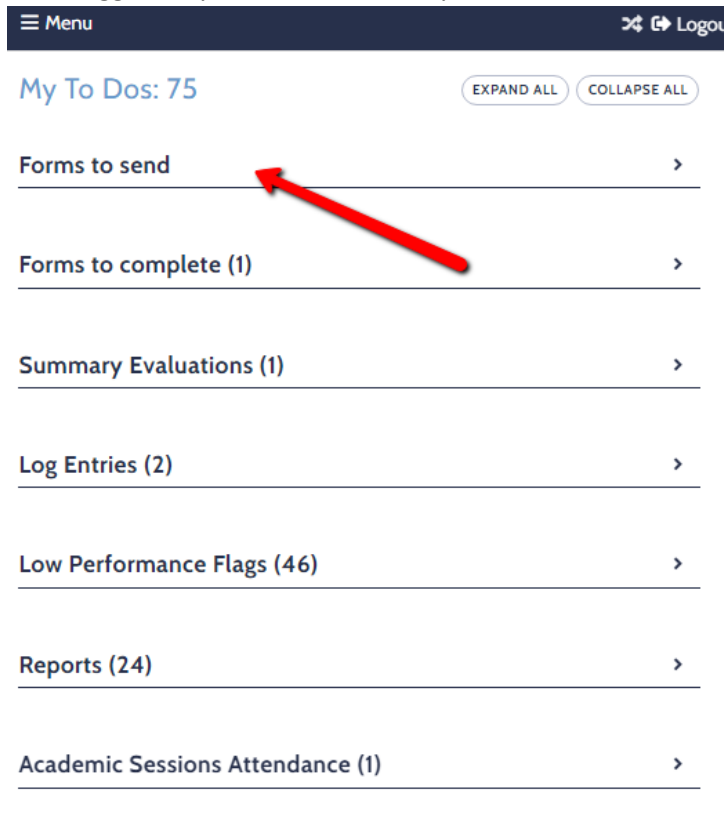
Results

HELP LOGOUT

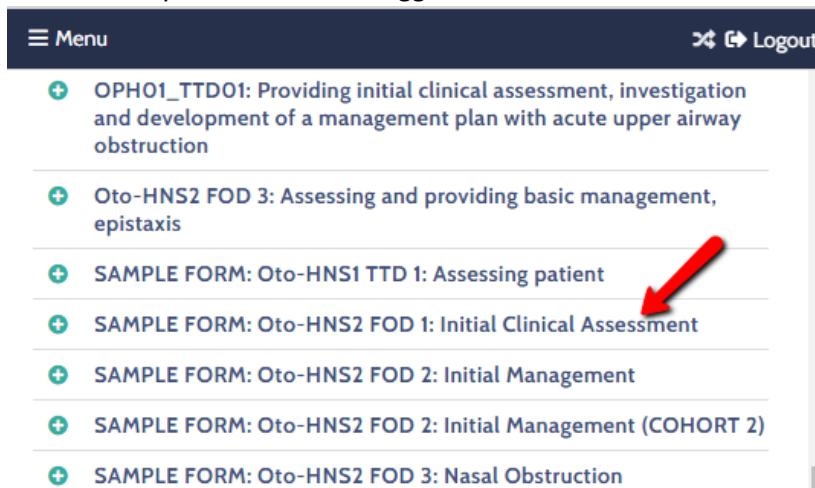
Forms to complete (13)					
(PGY1)	(Otolaryngology)			Initial Clinical Assessment	
Moy the CBME Resident, Bonny (PGY1)	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME	Aug 5/19	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	---
MacDonald, Barry the Resident (PGY1)	Med 1 (2023) :: 07 Electives or Family Medicine Experience	Undergrad	Aug 1/19 - 30/19	Assessment of Student by Preceptor - Rotating Elective Project	Dalhousie UGME
Parton, Dolly the Resident (PGY2) (due: Jul 10, 11:59pm)	04 - Transition to Practice (Otolaryngology)	Workshop - CBME	Jul 31/19	ENTO1_TTD01: Providing initial clinical assessment, investigation and development	---

Triggering EPA forms for residents you wish to assess (Mobile version)

1. On a web browser on your mobile device (e.g. Chrome, Firefox, Safari), log into one45 at <https://one45.med.dal.ca> and proceed to step 2. If you do not remember your username and password for one45, you can request a password reset from the log in page using these instructions:
 - a. Navigate to <https://one45.med.dal.ca>
 - b. Click *Need help logging in?*
 - c. Enter the email address associated with your one45 account (the email address you receive one45 alerts in).
 - d. Click *Send email reminder*.
2. Once logged in, you will be taken to your ToDos. You will see a list of menu items. Click on *Forms to Send*.



3. Pick the EPA you would like to trigger and fill out on a resident.



4. If you have the option, pick which rotation you observed or participated in the EPA you are now assessing the resident on. However, many departments run their EPA forms off of rotations based on CBME stage. If this is the case, a default will be automatically selected, as seen below. Click *Continue to step 2*.

Form to send
SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment

Step 1 - Select an event
02 -Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)

☒ 02 -Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)

[Continue to step 2 →](#)

Step 2 - Select a date

5. Specify the date the EPA was assessed. Click *Continue to step 3*.

Step 2 - Select a date
Nov 10, 2020

Nov 10, 2020

[Switch to date range](#)

[Back to step 1](#) [Continue to step 3 →](#)

Step 3 - Choose who you will be assessing

6. You may see the resident's name listed at the bottom of the search window. Click on their name or, if they are not listed, search and select the resident you are looking for. Click Send Form.

Step 3 - Choose who you will be assessing
Ballantine, R. Latasha the Resident (resident) [show selections](#)

[Pick from suggestions](#) or

First name [Search](#)

From search:
Select: [all](#) [none](#)

☒ Ballantine, R. Latasha the Resident (resident)

[Back to step 2](#) [Send form](#)

7. If you only picked one resident, it should open automatically, ready for you to complete. Otherwise, you can access it in your *Forms to Complete* section of your ToDos. Click on it, fill out all the mandatory questions, and submit it as you would other forms. If you need help with this process, see the *Completing EPA Forms* section of this manual below.

Target	Activity	Program	Dates	Form
Ballantine, R. Latasha the Resident (PGY4)	02 - Foundations of Discipline (Sample CBME Otolaryngology)	Sample CBME	Nov 10/20	SAMPLE FORM: C HNS2 FC Initial Cli Assessm
Lamovec, Mark the CBME Resident (PGY2)	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME	Oct 28/20	SAMPLE FORM: C HNS1 TTD Assessing patient

- a. NOTE: You might not be sure which form to open as some mobile devices cannot display all of the details of the form in smaller screens. Use your finger to scroll over to see the other details such as the name of the form that might be hidden.

Target	Dates	Form	Contact
Ballantine, R. Latasha the Resident (PGY4)	Nov 10/20	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	---
Lamovec, Mark the CBME Resident (PGY2)	Oct 28/20	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	

scroll to the left with your finger

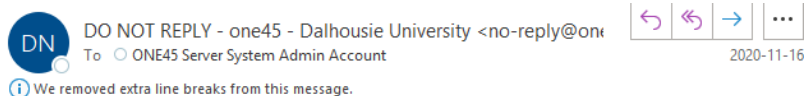
Completing EPA Forms

Completing EPA forms sent to you by residents (Desktop version)

1. You may receive an email from one45.com alerting you to a new ToDo to complete. If you do, click the link within the email and you will automatically be logged into your account. Otherwise, proceed to step 2.

NOTE:

- a. The log in links only work once. If you click on the link, but aren't ready to complete your form, it will not work for you later. You will need to log in manually (see step 2).
- b. If you were sent multiple forms in the same day, one45 will only send you one email so as not to bother you with multiple emails. Please periodically log in manually to check you don't have outstanding forms.



CAUTION: The Sender of this email is not from within Dalhousie.

Dalhousie University

You have a task to complete in the One45 system (e.g. survey, evaluation, objectives, log, form distribution).

You have received this email from the One45 system, because you either never logged into One45 and need to set up a password or because you have requested to reset it.

Your username is: ppalmer

Please click on the following link to reset your password:

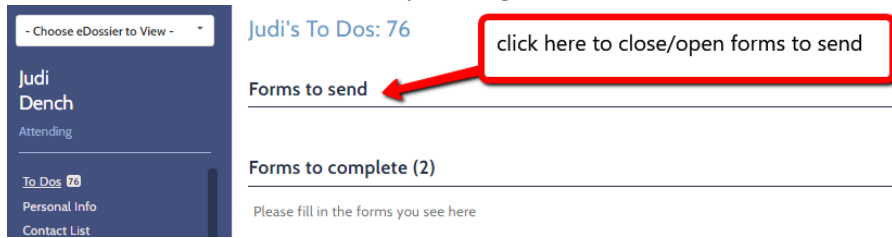
<https://one45.med.dal.ca/web/one45.php/auth/auto/redirect/0a798d9d85c7f69193a942c2c6690cd318>



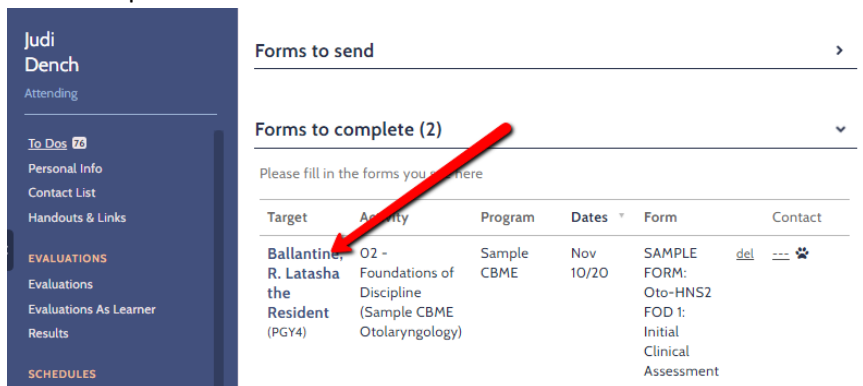
2. If you need to manually log in, and you know your username and password, open a web browser (Chrome, Firefox, Safari, Microsoft Edge) and navigate to <https://one45.med.dal.ca>, and proceed to step 3. If you do not remember your username and password for one45, you can request a password reset from the log in page using these instructions:
 - a. Navigate to <https://one45.med.dal.ca>
 - b. Click *Need help logging in?*
 - c. Enter the email address associated with your one45 account (the email address you receive one45 alerts in).
 - d. Click *Send email reminder*.
3. Once logged in, you will be taken to your ToDos by default.

Form	Assessment
**EM SAMPLE Foundations of Discipline Report Card	by me
CBD - GP - Narrative Feedback	by me
Direct Observation Form - Emergency Psych Assessment	by me
Direct Observation Form - Medication Review	by me
Direct Observation Form - Pediatric Psych Assessment	by me
ENT01_TTD01: Providing initial clinical assessment, investigation and development of a management plan with acute upper airway obstruction	by me
Eval of Resident by Faculty	by me
evaluation of faculty by student	by me
GERI-S2 FOD 2A: Assessing and providing initial management for patients with a deep neck space infection or peritonsillar abscess	by me
ITER - General Alien Medicine (c. 2017)	by me
KF SAMPLE FORM (c. May 2020 3:41pm)	by me

4. You will want to access your *Forms To Complete* section. If you don't see it right away, you can scroll down OR close the *Forms to Send* section by clicking on the *Forms to Send* title.



5. If you have been sent any EPA forms, you will see them in the *Forms to Complete* section. Click on the resident's name to open the EPA form.



6. The form will open in a new window. Fill out your form.

Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #1

Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction

Key Features:

- The observation of this EPA is divided into two parts: patient assessments and performing a procedure (elective tracheostomy: open tracheostomy, percutaneous tracheostomy, cricothyroidotomy)
- The patient assessment aspect of this EPA may include performing a flexible nasopharyngolaryngoscopy

Assessment Plan:

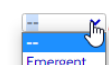
Part A: Patient Assessment

Supervisor does assessment based on direct or indirect observation

Collect 1 observation of achievement:

- At least one emergent case

*Case scenario

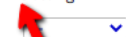


7. Any required fields will be marked with a red asterisk.

*Case scenario



*Setting



	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there
*Overall Assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

MILESTONES

8. When you are ready to submit the form, click *Submit*.

If you need to revisit the form later, save your changes by clicking *Save and Close*. It will be in your *Forms to Complete* section until you are ready to finish it or until the form expires.

☐ Yes

☐ No

The diagram shows three buttons in a row: **SUBMIT** (dark blue), **SAVE AND CLOSE** (light blue), and **CANCEL** (light blue). Below each button is a description of its function. Two red arrows originate from a point above the first two buttons and point to the **SUBMIT** and **SAVE AND CLOSE** buttons respectively.

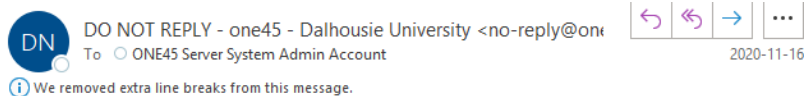
Button	Description
SUBMIT	Commit responses and remove form from your inbox.
SAVE AND CLOSE	Save current responses and keep form available in your inbox for revision.
CANCEL	Discard any changes to responses and keep form available in inbox for completion.

Completing EPA forms sent to you by residents (Mobile version)

1. You may receive an email from one45.com alerting you to a new ToDo to complete. If you do, click the link within the email and you will automatically be logged into your account. Otherwise, proceed to step 2.

NOTE:

- a. The log in links only work once. If you click on it, but aren't ready to complete your form, it will not work for you later. You will need to log in manually (see step 2).
- b. If you were sent multiple forms in the same day, one45 will only send your one email so as not to bother you with emails. Please periodically log in manually to check you don't have outstanding forms.



CAUTION: The Sender of this email is not from within Dalhousie.

Dalhousie University

You have a task to complete in the One45 system (e.g. survey, evaluation, objectives, log, form distribution).

You have received this email from the One45 system, because you either never logged into One45 and need to set up a password or because you have requested to reset it.

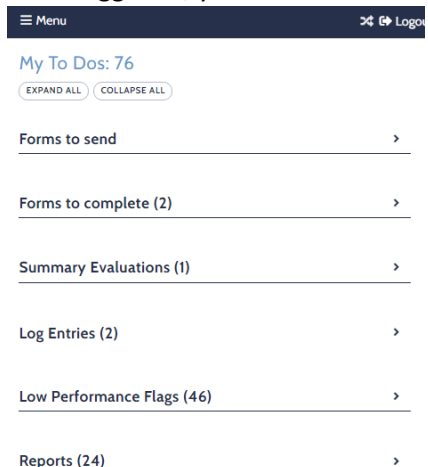
Your username is: ppalmer

Please click on the following link to reset your password:


<https://one45.med.dal.ca/web/one45.php/auth/auto/redirect/0a798d9d85c7f69193a942c2c6690cd318>



2. If you need to manually log in, and you know your username and password, open a web browser (Chrome, Firefox, Safari) and navigate to <https://one45.med.dal.ca>, and proceed to step 3.
If you do not remember your username and password for one45, you can request a password reset from the log in page using these instructions:
 - a. Navigate to <https://one45.med.dal.ca>
 - b. Click *Need help logging in?*
 - c. Enter the email address associated with your one45 account (the email address you receive one45 alerts in).
 - d. Click *Send email reminder*.
3. Once logged in, you will be taken to your ToDos by default.




- Click the *Forms To Complete* section.

Forms to complete (2) 

Please fill in the forms you see here

Target	Activity	Program	Dates
Ballantine, R. Latasha the Resident (PGY4)	O2 - Foundations of Discipline (Sample CBME Otolaryngology)	Sample CBME	Nov 10/20
Lamovec, Mark the CBME Resident (PGY2)	O1 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME	Oct 28/20

- If you have been sent any EPA forms, you will see them listed with the residents' names. Click on a resident's name to open the EPA form.

Forms to complete (2) 


Please fill in the forms you see here


Target	Activity	Program	Dates
Ballantine, R. Latasha the Resident (PGY4)	O2 - Foundations of Discipline (Sample CBME Otolaryngology)	Sample CBME	Nov 10/20
Lamovec, Mark the	O1 - Transition to Discipline	Sample CBME	Oct 28/20

- The form will open, oftentimes in the same window. Fill out your form.

Assessment Plan:
Part A: Patient Assessment
Supervisor does assessment based on direct or indirect observation

Collect 1 observation of achievement:
-At least one emergent case

*Case scenario
 Emergent

*Setting
 Clinical

*Overall Assessment
☐ I had to do
☒ I had to talk them through
☐ I needed to prompt

- Any required fields will be marked with a red asterisk.

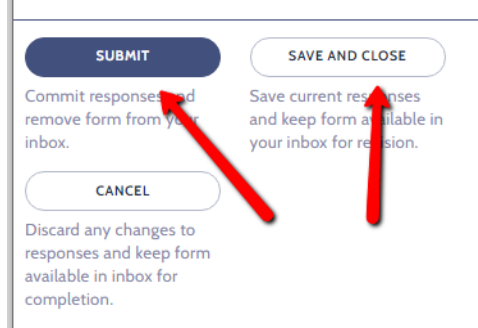
MILESTONES

*Recognize urgent issues that may need the involvement of more senior colleagues and engage them immediately

☐ Not observed
☐ In Progress
☐ Achieved

8. When you are ready to submit the form, click *Submit*.

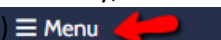
If you need to revisit the form later, save your changes by clicking *Save and Close*. It will be in your *Forms to Complete* section until you are ready to finish it or the form expires.

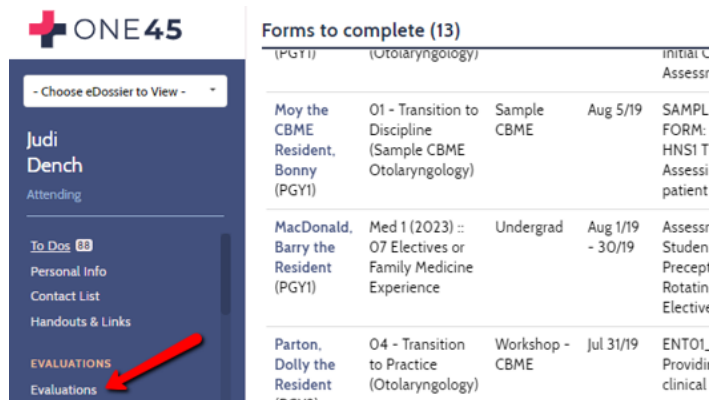


The screenshot shows a form submission interface with three buttons: **SUBMIT**, **SAVE AND CLOSE**, and **CANCEL**. Each button has a corresponding description below it. A red arrow points from the text 'click *Submit*' in the instruction above to the **SUBMIT** button. Another red arrow points from the text 'clicking *Save and Close*' in the instruction above to the **SAVE AND CLOSE** button.

Button	Description
SUBMIT	Commit responses and remove form from your inbox.
SAVE AND CLOSE	Save current responses and keep form available in your inbox for revision.
CANCEL	Discard any changes to responses and keep form available in inbox for completion.

Reviewing forms you previously completed (Desktop and Mobile)

1. To look at forms you have completed previously, click *Evaluations*. (If you are using a mobile device, you will need to click on the Menu button first )



(PGY1)	(Otolaryngology)	initial C
Moy the CBME Resident, Bonny (PGY1)	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME Aug 5/19 SAMPL FORM: HNSI T Assessr patient
MacDonald, Barry the Resident (PGY1)	Med 1 (2023) :: 07 Electives or Family Medicine Experience	Undergrad Aug 1/19 - 30/19 Assessr Studen Precept Rotatin Elective
Parton, Dolly the Resident (PGY2)	04 - Transition to Practice (Otolaryngology)	Workshop - CBME Jul 31/19 ENT01, Providii clinical assessr

2. For quick results, click *all*.

Evaluations

View forms for rotations/courses started between these dates:

☐ last month ☐ last 6 months ☒ all ☐ choose specific dates

3. Click the section *Forms you completed*.

View forms for rotations/courses started between these dates:

☐ last month ☐ last 6 months ☒ all ☐ choose specific dates

Forms you completed

(77 forms for rotations/courses that started between Jul1/02 and Nov30/25) >

4. You will now see all the forms you have completed on residents and students.

Forms you completed			
(77 forms for rotations/courses that started between Jul1/02 and Nov30/25)			
Target	Rotation	Start Date	End Date
WORKSHOP, RESIDENT Megan B	MED 4 Rotation General	Jun 01, 2014	Jun 02, 2014
Smith, Mary	Sample Rotation 2	May 04, 2014	May 10, 2014
Smith, Mary	Sample Rotation 2	May 04, 2014	May 10, 2014
MacDonald, Sally	SAMPLE ROTATION	Nov 22, 2014	Nov 28, 2014
MacDonald, Sally	SAMPLE ROTATION	Nov 22, 2014	Nov 28, 2014

5. You can sort the results by target name, rotation, start or end date, form, etc.

Forms you completed
(77 forms for rotations/courses that started between Jul1/02 and Nov30/25)

Target	Rotation	Start Date	End Date
Ballantine, R. Latasha the Resident	O1 - Transition to Discipline (Otolaryngology)	Oct 23, 2019	Oct 23, 2019
Ballantine, R. Latasha the Resident	O2 - Foundations of Discipline (Otolaryngology)	Sep 01, 2020	Sep 15, 2020
Ballantine, R. Latasha the Resident	CBME	Aug 26, 2020	Aug 26, 2020

6. For users on a desktop, click the *view* link at the end of each row and the form will open in a new tab.

indicates a mandatory response

Formative In-training Evaluation

Competencies

Please evaluate your student against expectations for his/her level of training

SKILLED CLINICIAN

	Unable to assess	Fails to Meet	Partially Meets	Meets	Exceeds
*1. Obtain a complete and accurate history	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*2. Complete a thorough and accurate physical examination	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Jul1/02 and Jun26/25) click to view

Form	Group	
new ITER - Surgery (c.03/2014)	Test Space UGME	view
Assessment of Student by Preceptor - Med 3 ITER (FORMATIVE) 12/13	Test Space UGME	view
Assessment of Student by Preceptor - Med 3 ITER (SUMMATIVE) 12/13 (Updated Jan 2013)	Test Space UGME	view
*ITER - Surgery (deactivated 06/01/2017)	Test Space UGME	view
Evaluation of Faculty by student	Test Space UGME	view
Evaluation of Peer - Professional Competencies (c. Oct. 2015)	Test Space UGME	view
Evaluation of Peer - Professional Competencies (c. Oct. 2015)	Test Space UGME	view
dummy NEPH1 - TOD - 1A - Assessing patients with kidney disease	Workshop - CBME	view

7. For users on a mobile device, do the following:
- Scroll over to the right to access the view menu. Click view for the form you want.

Forms you completed
(77 forms for rotations/courses that started between Jul1/02 and Nov30/25)

Start Date	End Date	Form	Group	
Oct 23, 2019	Oct 23, 2019	SAMPLE FORM: Oto-HNS2 FOD O1: Initial Clinical Assessment	Workshop - CBME	view
Sep 01, 2020	Sep 15, 2020	SAMPLE FORM WITH two answers	Workshop - CBME	view
		SAMPLE Foundations of Discipline Report Card	Test Space PGME	view
		SAMPLE Foundations of Discipline Report Card	Test Space PGME	view
Aug 22, 2018	Sep 18, 2018	ITER - Dermatology	Workshop - CBME	view
Aug 22, 2018	Sep 18, 2018	ITER - Dermatology	Workshop - CBME	view

scroll to the right with your finger

- b. The form will open, on some browsers as a new window, on others in the same window.

Dalhousie University
Workshop - CBME

 Evaluated : Dench, Judi (Attending)
By
Evaluating : **Ballantine, R. Latasha the
Resident (Resident) - PGY4**
Rotation : O1 - Transition to Discipline
(Otolaryngology)
Dates : Oct 23, 2019
Completed : Feb 28, 2019
on

* indicates a mandatory response

Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #1

Providing initial clinical assessment, investigation
and development of a management plan for
patients with acute upper airway obstruction

Key Features:

- This EPA includes performing a history and examination focusing on the head and neck, synthesizing the case and presenting to supervisor

Assessment Plan:

Supervisor or delegate does assessment based on direct or indirect observation with review of consult letter

- c. If it opened in the same window, hit back on your browser to get back to the one45 interface.